DOCUMENT RESUME

ED 243 482 IR 050 707

TITLE OMS Annual Report, 1983.
INSTITUTION Association of Research Libraries, Washington, D.C. Office of Management Studies.
PUB DATE 83
NOTE 61p.; For related document, see ED 233 738.
PUB TYPE Reports - Descriptive (141)

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS *Academic Libraries; Annual Reports; Consultants; *Information Dissemination; Information Processing; Inservice Education; Library Acquisition; *Library Administration; *Library Associations; Library Collections; Library Services; *Management Development; Program Implementation; *Research Libraries; Staff Development
IDENTIFIERS *Association of Research Libraries

ABSTRACT

This report describes 1983 Office of Management Studies (OMS) programs and services, including: (1) the Academic Library Program (ALP), which covered the Public Services Project, the Collection Analysis Project (CAP), the Small College Collection Assessment Project, the Preservation Planning Program, the Organizational Screening Program, the Academic Library Development Program (ALDP), the Management Review and Analysis Program (MRAP), and the Planning Program for Small Academic Libraries (PPSAL); (2) the Academic Library Consultant Training Program; (3) the Information Exchange and Publications Program, which included the Systems and Procedures Exchange Center (SPEC); (4) the Organizational Training and Staff Development Program, which provided management skills institutes, special focus workshops, and the Management Training Film Program; and (5) applied research and development services for member libraries of the Association of Research Libraries (ARL), including the Collaborative Research/Writing Program, the National Collections Inventory Project, and public services research and other projects. Also described are OMS objectives and directions over the past 13 years, highlights of 1983 activities, and OMS priorities for 1984. Appendices include a bibliography of OMS publications in 1983, a brief financial report, a directory of OMS advisory committees, a list of OMS consultant trainees and their project assignments as of the end of 1983, and a listing of the OMS staff. (ESR)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED243482

OFFICE OF MANAGEMENT STUDIES

Association of Research Libraries

ANNUAL REPORT 1983

IR050 707

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Maxine Sitts

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

OMS
ANNUAL REPORT
1983

Duane E. Webster, Director
Jeffrey J. Gardner, Associate
Jutta Reed-Scott, Collection Development Specialist
(beginning July 1983)
Donna J. Reilly, Office Manager
Jane A. Rosenberg, Research Specialist
Maxine K. Sitts, Information Services Specialist
Maureen Sullivan, Training Program Specialist
(through February 1983)
Patricia K. Swanson, Public Services Specialist
(through November 1983)

Office of Management Studies
Association of Research Libraries
1527 New Hampshire Avenue N.W.
Washington, D.C. 20036
(202) 232-8656

IR050707

TABLE OF CONTENTS

I.	Introduction	1
II.	Highlights of OMS Activities in 1983	5
III.	The Academic Library Program	7
	Public Services in Research Libraries	9
	Collection Analysis Project (CAP)	10
	Small College Collection Assessment Project	11
	Preservation Planning Program	12
	Organizational Screening Program	12
	Academic Library Development Program (ALDP)	13
	Management Review and Analysis Program (MRAP)	13
	Planning Program for Small Academic Libraries (PPSAL)	14
IV.	Academic Library Consultant Training Program	15
V.	Information Exchange and Publications Program	18
	Flyers and Kits	19
VI.	Organizational Training and Staff Development	22
	Management Skills Institutes	23
	Special Focus Workshops	25
	Management Training Film Program	27
VII.	Applied Research and Development	28
	Collaborative Research/Writing Program	28
	National Collections Inventory Project	29
	Public Services Research Projects	29
	Institute for Library School Faculty	31
	Technical Services Study	32

VIII. OMS Priorities for 1984 33
Academic Library Program 33
Information Exchange and Publications Program 34
Organizational Training and Staff Development 34
Applied Research and Development 35

Appendices

A. Staff and Program Publications, 1983 36
B. Financial Tables for 1983 39
Sources of Support
OMS Program Expenditures
OMS Line Item Expenditures
Separately Funded Projects
C. OMS Advisory Committees, 1983 40
D. Consultant Trainees and Project Assignments as of December 31, 1983 45
E. Office of Management Studies Staff in 1983 56

I. INTRODUCTION

Dealing with change is a central issue--perhaps the central issue--for academic and research libraries in recent years. During the seventies librarians found that inflation and stable budgets forced them to streamline operations and tighten management control. In the eighties, the work of research library managers is even more demanding because of changing student clientele, growing technological imperatives, and the redefinition of the role of information agencies in the academic environment.

One lesson gained from recent experience is that research libraries can adapt to economic pressures. Because the prevailing philosophy is that smaller means poorer quality, imposed cutbacks cause considerable anxiety. There have been efforts to attract attention to the plight of libraries by restricting services that have broad impact. In other cases, libraries have quietly absorbed the cuts, calling on staff to assume extra burdens on the assumption that monetary restrictions are short-term. In still others, administrators have imposed across-the-board cuts, eliminating expendable services and sacrificing personnel. Libraries have learned to live with the reductions, and the process has often led to a tighter operation.

For the forseeable future, managing with limited resources is the reality. If libraries approach this reality negatively, they will be at a disadvantage in influencing the university administration. A positive posture will enable library managers to take a larger role in academic decision-making, and to aggressively redefine the capabilities of the research library. Elements of this new management posture include committing to organizational review and strategic planning; searching for alternative sources of support and funding; pursuing innovative new models of service and operation; restructuring roles and relationships to make the best use of human resources; redefining decision-making processes; seeking broader staff involvement; using more analytical and quantitative information to support decisions; and investing in ongoing development of staff resources.

University administrators can find significant funds to support new library efforts if the investment promises to help the institution deal with the future. Librarians have convinced universities to help support major organizations such as the OCLC Online Computer Library Center, the Research Libraries Group and the Washington Library Network, as well as local automation efforts that carry significant costs. These successes should encourage others to pursue innovative uses for risk capital to allow libraries to evolve new roles and concepts of service.

Of all the tasks facing the research library manager, however, visualizing the library of the future has proved most difficult. Futurists observe that generally we overestimate the extent and character of changes in the long term, while underestimating the extent and character of changes in the next five years. It seems impossible to tell just what the rapid alterations in society, government, universities, technologies, and the library profession will mean for libraries during the next decade. While there are many grand schemes for the library 20 years into the future, the real problem facing most administrators today is how to succeed during the next five years.

Regardless of how the future evolves, the last few years have shown the importance of an active, positive stance on the part of senior library management. An aggressive, even combatant, style is needed to influence university information policy and university investment decisions during the next decade.

The role of the ARL Office of Management Studies is to help research library managers prepare for this vague and highly demanding future. During its first 13 years, the Office designed a series of self-study techniques aimed at analyzing and strengthening library programs in management, collections, preservation, and services. These techniques are fundamentally change strategies aimed at involving wide elements of the affected community in a problem-solving and planning effort to shape future capabilities.

The OMS also has added to the fund of information for library administrators. The Systems and Procedures Exchange Center (SPEC) now has published 100 SPEC Flyers and Kits covering matters of concern to front line managers in academic and research libraries. These materials extend awareness of current practices in research libraries, stimulate problem solving, and test currency of library practices.

The staff training component of OMS is recognized in the profession as a major management development effort. Hundreds of library staff members have participated in Management Skills Institutes, special focus workshops, or in-house training activities. These training efforts are aimed at strengthening individual awareness of personal roles in contributing to improved library performance.

This annual report reviews the past year's activities in each of the major programs, and describes developmental projects that indicate future emphases of the Office. First is the design and testing of the public services self-study funded by the General Electric Foundation. The self-study reviews the public service function in research libraries and encourages the investigation of innovative service models. Second is the application of OMS experience with collection studies to the preparation of a national inventory of research library collections. Funded by the Council on Library Resources and the Lilly Endowment, this project employs the RLG conspectus as a tool to describe institutional collections systematically and comparatively. The availability of the resulting data should facilitate regional and national resource development planning. A third developmental effort is an Institute on Research Libraries for Library School Faculty, funded late in 1983 by the Council on Library Resources. The Institute is intended to strengthen the dialogue among library directors and those involved in the preparation of future library staff.

These developmental projects are based on a change in funding arrangements for the Office. The five-year funding for the Academic Library Program proviced by the Mellon Foundation and the Council on Library Resources concluded in September 1983. For future funding, both agencies indicate a preference for shorter term projects with specific outcomes. Concurrently, the ARL Board has committed the Association to ongoing financial support for core operations.

The character of the OMS is evolving in accordance with its inventory of resources and services, changes in financial circumstances, and as the needs of research library managers require. In the long term, OMS programs must expand the behavioral emphasis of the past to include more analytical and quantitative components. This shift is predicated on the availability of support from ARL directors. After all, the future of the Office is dependent on the strength and success of those we assist.

II. HIGHLIGHTS OF OMS ACTIVITIES IN 1983

Thirty-one libraries participated in self-study programs, with 16 working on CAP projects, seven on public services projects, four in the organizational screening program, and four in the Academic Library Development Program.

Seven ARL libraries were selected to conducted assisted self-studies as part of the General Electric Foundation-supported Public Services in Research Libraries Project: Brown University; the University of California, Riverside; Columbia University; Michigan State University; the Newberry Library, the University of North Carolina; and Temple University.

Under the research component of the Public Services Project, seven libraries were awarded grants to carry out projects: the University of Arizona; Cornell University; Michigan State University; New York University; Pennsylvania State University; University of Illinois; Urbana; and Texas A & M University.

Working with six libraries in the Washington Consortium of Universities, the OMS completed a Meyer Foundation-funded project to carry out CAP studies and develop a procedure to help regional consortia strengthen resource sharing programs.

The Office collaborated with committees and executive staff of the Association on a $46,000 Council on Library Resources-funded project to develop tools and procedures for a national inventory of research collections. A $95,000 grant from the Lilly foundation funds a second phase of the project, which will include testing tools and procedures in three ARL member libraries in Indiana: Notre Dame University, Purdue University, and Indiana University.

1983 was the final year of the Consultant Training Program. A fourth class of 22 members was chosen and trained during the year, and other consultant trainees continued to work with the Office on practicum assignments. With the 1983 class, the total number of consultants trained in the program is 77.

The Systems and Procedures Exchange Center issued 10 kits/flyers, maintained 400 subscriptions, filled 719 information requests, and conducted five surveys. The Center also improved the physical quality and accessibility of SPEC kits.

Publications in 1983 included the Index to SPEC Kits, a revised Resource Notebook on Staff Development, and Occasional Paper no. #7: Budget Allocation Systems in Academic Libraries, by John Vasi.

In the Organizational Training and Staff Development Program, activities included nine Management Skills Institutes, two Advanced Management Skills Institutes held by special invitation in Australia, and nine special focus workshops.

The Council on Library Resources provided funding ($54,600) for a project that involves OMS staff in designing, conducting, and evaluating an institute for library school faculty. The three-week institute will be held in July 1984.

III. THE ACADEMIC LIBRARY PROGRAM (ALP)

The Academic Library Program assists libraries in improving management and planning for and instituting change. The program's approach assumes that effective assessment, planning, and change benefit from an initial focused project over a specific time frame; that preparing for the future depends on understanding and building on the past and present; and that organizational assessment reaches beyond the physical boundaries of the library to encompass the total institutional environment and the society in general. Additionally, developmental efforts involve the total organization, and develop staff understanding and skills, as well as enhancing internal cooperation and dedication to improvement.

Self-study with OMS consultant assistance is the basic strategy. The library director, in consultation with trained consultants, library staff, and administrative officers, makes the decision to undertake the program. The director then appoints a study team to guide the work. Activities are not limited to members of the team, who may call upon other staff to form task forces to collect information, discuss alternatives, and formulate recommendations for the team's evaluation. The study team develops a final report detailing the results of investigations and discussions, and concluding with recommendations for action.

Self-studies are tailored to the local situation. Libraries can choose to complete a full study, or select from particular topics. The construction of the study is assisted by OMS staff and trained consultants, who continue to work with participants for the duration. Consultants can provide resources, advice on the self-study process, additional training programs for staff, and other assistance as needed. Their help is intended to facilitate the work, and assure that projects are completed within reasonable time frames.

Libraries find that self-studies require a significant amount of staff time and resources for a few months, but the work and the process is highly rewarding over a long time period. Studies provide the opportunity to thoroughly examine the library's past, better understand the present, and work toward a future that is planned rather than forced upon the organization. Individuals become more cognizant of the library's strengths and institutional constraints, and develop skills in working together both within and outside normal organizational lines. A means of measuring results is provided through recommendations in the final report so that progress can be tracked after the study ends. Some libraries have systematically assessed results through regular reviews of progress.

Since the program began with the Management Review and Analysis Project (MRAP) in 1973, scores of libraries have worked on self-study projects. In 1983, alone, 31 different libraries were engaged in self-studies involving up to 1,000 direct participants. The expansion of the ALP to encompass six different study procedures, as well as modular and training programs fitted to the needs of particular libraries' situations, has been steady, due in great part to participants' enthusiasm. Whatever may be said of their financial constraints, the energy level of libraries seems to suffer no reverses. The availability of a constant stream of capable individuals interested in securing the necessary background and training to help libraries with self-study efforts is additional evidence of the will that exists to meet the challenges research libraries face. The Consultant Training Program, which has provided talented individuals with appropriate perspectives and experience to further future self-study efforts, is accorded a separate chapter in recognition of its termination with the training of the 1983 class. The current self-study programs are described below.

Public Services in Research Libraries

Begun in 1982 under a $250,000 grant from the General Electric Foundation, the Public Services Project is a two-year effort to develop a methodology and consulting assistance for research libraries that wish to assess services, establish priorities, and formulate ways to meet increasing external and internal economic and political pressures. The program also includes a research component (see Section VII). In the self-study area, the following activities are included:

The design of a process for public services self-study and analysis.

Production of a public services manual that libraries can use to do a comprehensive services study, or to work on specific services-related topics.

Improvement of data gathering and analysis through the design of instruments and forms for analyzing services.

Determination of the feasibility of providing a central data analysis service for libraries engaged in self-study projects, and design and implementation of this capability if need is demonstrated.

Provision of training for library staff and development of a cadre of trained consultants to assist self-study and training programs.

In early 1983, six libraries were chosen to receive support for pilot public services studies: the University of California, Riverside; Columbia University; Michigan State University; Brown University; the University of North Carolina; and Temple University. The first three began their studies in March; the second group in September. Plans also were made for the Newberry Library to conduct a public services study for independent research libraries under the program.

The libraries were chosen from a group of 18 applicants, to represent a balance of geographic location, governance, student body and collection size, and network/utility affiliations. Key issues included in the studies are providing services to a changing, non-traditional student body; integrating the library into university-wide computing and communication facilities; reorganizing major public service units; strengthening organizational relationships in decentralized systems; and offering services to independent researchers and other external users.

During 1982 through November 1, 1983, the project was coordinated by Patricia K. Swanson, on leave from the University of Chicago. OMS staff are assuming coordination duties for the duration of the work. Results of the project, including a manual and a study process, will be available by late 1984 as part of the Academic Library Program. Reports from the pilot libraries also will be available from OMS.

Collection Analysis Project (CAP)

Libraries of various types and sizes can use the Collection Analysis Project to examine their collection development policies and procedures. Participants in CAP studies can complete the entire collections program or select from topics such as collection history and description, collection objectives, policies, fund allocations, organization and staffing, collection assessment, and resource sharing.

During 1983, CAP projects were in progress at 16 libraries, including six as part of a cooperative effort. The University of Michigan and McGill University completed CAP studies. Projects continue at the University of Maryland, the University of Colorado, and the University of Houston. New studies began at the University of Alberta, Vanderbilt University Business Library, Duke University, and Georgetown University Law Library. The University of Wyoming plans to begin a CAP study early in 1984.

Six libraries in Washington D.C. have used a grant from the Eugene and Agnes E. Meyer Foundation for a cooperative collection analysis effort. Libraries at five member institutions of the Consortium of Universities of the Washington Metropolitan Area -- American University, Catholic University, Georgetown University, Howard University, and the University of the District of Columbia -- began CAP studies in Fall 1982. A sixth participant, George Washington University, had already completed a Collection Analysis Project. A representative from each institution participated in a resource sharing task force.

The task force members, assisted by OMS staff, discussed their individual CAP experiences and ways of applying the knowledge to cooperative collection analysis. Each library completed two sections of the Research Libraries Group Conspectus (Classes N and P) to provide comparable information about collections in the fine arts and language and literature. Members also compared standard bibliographies with holdings in those subject areas, and summarized the data in an overlap study. Reports of the CAP studies, as well as the final report of the Washington Consortium Project, are expected early in 1984.

Small College Collection Assesssment Project

Last year's annual report described this project to refine and test collection survey procedures for college libraries. During 1983, four institutions finished pilot self-studies that included testing the assessment manual developed by the OMS. Libraries at the Atlanta College of Art, Dillard University, Tougaloo College, and Tuskegee Institute participated in this project, and all have submitted their reports. The manual is being readied for publication and general distribution.

Preservation Planning Program

Developed under a 1980-82 grant from the National Endowment for the Humanities, the Preservation Planning Program consists of a self-study process with accompanying documentation. The Program helps libraries assess their current preservation efforts, identify needs, and plan improvements. Reports on three completed preservation studies are available from the Office.

Assessing all aspects of preservation is a complex task and requires considerable technical knowledge. The program deals with both organizational and technical needs. It includes modules on reviewing the extent of deterioration in collections, assessing current programs and organizational factors, ascertaining effects of the physical environment on materials, and preparing for emergencies and disasters. Materials on accepted current practices, advice on needed equipment, and assistance in reviewing preservation needs are included in a separate Preservation Resource Notebook.

Several OMS consultants who are preservation officers or are acquainted with the field can be assigned to assist preservation studies. The Office is making the Preservation Study available on a consultant basis. Manuals and resource notebooks also can be purchased separately. During 1983, libraries requested 259 study manuals and 229 resource notebooks.

Organizational Screening Program

Studies that concentrate on specific issues or organizational features are available to libraries of several sizes through the Organizational Screening Program. Each study is developed to fit individual needs and can be completed during a limited time span. With consultant assistance, libraries have used organizational screening programs to investigate physical facilities, to conduct planning retreats and team building programs, and to consider staffing patterns. Results range from detailed recommendations and formal reports to increased awareness of problems and needs.

The University of Arizona used the program twice during 1983: to complete a planning study of its Science-Engineering Library and to organize a general planning retreat. Another planning project was completed at San Jose State University, and at Syracuse University, the library carried out a public services organizational study.

Academic Library Development Program (ALDP)

Libraries with between 20 and 100 staff members use the ALDP for self-studies. As with other programs, it is possible to choose a comprehensive study, or selected topics such as services and collections, operations, management practices, facilities, and technological adaptation. Most libraries complete the program within nine to twelve months.

During 1983, four libraries worked on ALDP studies: California State University, Sacramento; University of Miami; Northeastern University; and Southeast Missouri State University. Reports from Southeast Missouri, Northeastern, the University of Tulsa, and the University of Miami have been received.

Management Review and Analysis Program (MRAP)

The MRAP program examines library management functions including planning, budgeting, policy making, management information systems, supervision and leadership, organization, personnel practices, and staff development. Mid-sized and large academic and research libraries can choose the complete management study or limited topical studies.

During 1983, there were no MRAP studies in progress; Mankato State University plans to begin the program in 1984. Reports from a number of libraries that have used the program are available from the Office.

Planning Program for Small Academic Libraries (PPSAL)

Libraries with staffs of 20 or less use the Planning Program for Small Academic Libraries as a tool for reviewing current operations and programs and planning changes. More that 20 libraries have used the program, which was initiated with the aid of a Lilly Endowment grant. Studies are facilitated by participants from the Consultant Training Program.

During 1983, Earlham, Hanover and Transylvania Colleges continued PPSAL studies. Butler University will began a project in January 1984.

IV. ACADEMIC LIBRARY CONSULTANT TRAINING PROGRAM

The Consultant Training Program began in 1979, when the OMS received support from the Council on Library Resources and the Andrew W. Mellon Foundation for a five-year effort to train up to 100 librarians to serve as consultants to assist library self-study and training programs. In 1982, the General Electric Foundation began contributing support under its grant for the Public Services in Research Libraries Project.

Selection

Over the past five years, 77 consultant trainees were selected following national search processes that included written applications, individual interviews, and participation in screening workshops. Over 650 individuals applied, and nearly 285 were interviewed. An advisory committee and OMS staff made preliminary selections based on the following criteria: five years of successful library experience; demonstrated skills in dealing with colleagues; analyzing and solving problems, and making decisions; demonstrated communication skills, especially openness to new ideas; tolerance for differing viewpoints and ability to articulate ideas; and the ability to devote up to 22 days to the program (on a released time or personal leave basis). The selection committee also considered the candidates' experience in library self-studies, special management training, accomplishment in an area covered by OMS studies, and potential for working within the assisted self-study approach to organizational change and development.

The final selections were made through an assessment workshop, which involved an intensive problem-solving situation and individual and group work on organizational and professional issues.

Table 1: Selections for the Consultant Training Program

	Applications received	Interviews	Assessment workshop	Trainees accepted
1980	250	88	40	20
1981	159	67	23	20
1982	120	70	36	15
1983	148	60	34	22

Training

The comprehensive two-week Consultation Skills Workshops were designed by OMS staff especially for the program. Sessions dealt with identifying and diagnosing library problems; theory and concepts of library training and consultation; the consultation process; OMS self-study procedures and training programs; and facilitating the work of groups engaged in problem-solving and exploration of issues. During the second week of the workshops, participants formed consulting teams to undertake projects at libraries in the Washington D.C. area.

After the workshops, many consultants began a year-long practicum in which they worked with OMS staff members to conduct library studies, complete research and publications, and assist with training programs. Candidates were encouraged to complete a directed reading program, design study interventions, prepare organizational assessments, and participate in related workshops, institutes, and conferences.

Some members of the first three classes now are serving as principal consultants for self-study projects. A roster of the trainees and their assignments is included in this report as Appendix D.

Results

At the outset, consultant training was intended principally to make assisted self-studies more broadly available to libraries. In practice, the program also has provided a cadre of librarians willing and able to conduct training programs, and it has helped participants in their current positions. A strong network for sharing information and ideas has grown up among the participants. In some cases, the training has provided experience and exposure for librarians ready for new assignments as senior managers of academic and research libraries.

Reaction to the program from both participants and clients has been favorable, although some reservations have been expressed about a possible oversupply of consultants. However, there are other benefits. A majority of the consultant trainees have come from ARL member libraries and return to those libraries; many use skills acquired through the program primarily to benefit their home institutions and accept consulting work on an occasional basis.

In 1982, the Journal of Academic Librarianship published a symposium on the Consultant Training Program (Joanne Euster, ed., "ARL/OMS Consultant Training Program," v.8, #4, pp. 200-210). The article combined views from OMS staff, consultant trainees, and library directors on the outcomes of the program: its development of and contribution to the careers of individuals, the development of a group of consultants to assist libraries in conducting self studies, and the promise of the cadre of consultants for the future of organizations.

The Future

The OMS plans to continue work with the consultants. The network of talent established through the program will be maintained, and the OMS will provide referrals to consultants at the request of interested college or university libraries. Trainees will continue their consulting and training assignments on OMS projects, and also will do writing and research within the Collaborative Research/Writing Program.

V. INFORMATION EXCHANGE AND PUBLICATIONS PROGRAM

During 1983, the Systems and Procedures Exchange Center (SPEC) maintained 400 subscriptions to OMS publications, distributed over 6,000 kits and flyers and other publications, and researched 719 information requests. As the communication and information facility for ARL members, SPEC collects and disseminates information on research library operations and management. OMS staff obtain materials from member libraries, supply information and documents in response to requests, and provide analyses of current trends and issues. Several publications are written collaboratively by staff from ARL member libraries.

SPEC activities during the year included a full survey of the ARL membership on branch libraries, and limited surveys on online catalogs, library materials costs, telecommunications, and building renovation. Several on-demand surveys were conducted at the request of ARL members, including inquiries on archives, fund raising, and collection security. Ten kits and flyers were produced, five of which involved cooperation with librarians participating in the OMS Collaborative Research/Writing Program. (See Section VII)

A major emphasis of 1983 was improving the quality of publications and the means of accessing SPEC kits and files. Kits now are perfect bound with the titles printed on the spines, and each contains a short bibliography of related materials suited to the kit topics. A new publication, the Index to SPEC Kits, 1973-1983, has been compiled and will be updated every six months. Intended to help users locate information in SPEC kits and to identify and bring together material on similar subjects scattered through a number of kits, the Index is arranged alphabetically by subject headings that are based in part on Library Literature. Each entry includes title, SPEC Kit number, and date of publication. The publication will be mailed to SPEC subscribers as part of their subscription service. It also may be purchased separately.

SPEC files, which contain members' documents and other materials, are arranged by broad subject areas and are used primarily for responding to member requests and as resources for OMS staff. During 1983, SPEC staff worked on weeding outdated materials, requesting new information, and providing a new system for recording and responding to users' requests. The system is intended to help target important topics for file expansion and for upcoming publications.

The Office issued a new Resource Notebook on Staff Development, compiled to replace the edition published in 1978. Designed to assist academic libraries in developing, expanding, or improving staff development activities, the notebook is part of a series intended to provide tools to assist information gathering, organizational analysis, and planning changes. It is divided into four sections: an introduction that provides an overview of current program trends; a section of data-gathering instruments; a group of current comprehensive and special staff development program statements; and a number of documents that illustrate approaches to program change. A bibliography also is included.

Flyers and Kits

The following kits and flyers were produced during 1983:

Integrated Library Information Systems (#90, January, 1983). As library automation becomes more firmly entrenched, more attention has been directed to developing systems that integrate various functions. Thirty-one ARL libraries took part in a fall 1982 SPEC survey on this topic. Approximately 90 percent indicated plans or actions toward developing integrated systems. Variations in implementation are occurring most frequently at the procedural level rather than at the policy level, with decisions focusing on planning and justification, implementation, funding, and the role of consultants.

Student Assistants in ARL Libraries (#91, February, 1983). Student workers help meet long service schedules, and keep collections in order and catalogs up to date. In addition, some of the most interested candidates for library school are recruited from the ranks of student employees. Changes in library operations and technology require careful evaluation of the tasks for students, to make the best possible use of their time and talents.

Interlibrary Loan (#92, March, 1983). Although technological developments and cooperative arrangements are making interlibrary loan more efficient, a number of questions remain about expanding request loads as well as ILL financing and administration. During the summer of 1982, SPEC surveyed the ARL membership on the subject; 110 of the 113 libraries, or 97% responded. The kit contains a full report on the survey results as well as ILL policies and related documents.

User Instructions for Online Catalogs (#93, April, 1983). Making the transition from the card catalog to the online public access catalog with users as allies rather than adversaries is an important issue in research libraries today. Effective, appropriate instructions, well-designed and well-placed, play a key role in acceptance of the online catalogs. The kit contains examples of user instructions produced for use with recently introduced online public access catalogs.

Fund Raising (#94, May, 1983). According to a SPEC survey in January 1983, over half of the 95 responding libraries (85% of the ARL membership) had been named in a university-wide campaign as a target area for funds in the past three years. Over three-fourths of the respondents had conducted efforts independent of the university during that period. In addition to book funds and special collections, libraries are requesting assistance for automation, building renovation, preservation activities and equipment purchases.

Library Materials Cost Studies (#95, June, 1983). More libraries are taking advantage of computerized acquisition systems for the production of local data on materials costs. However, most institutions are dependent on published data because they do not have the staff or the time for exhaustive studies. Others use vendor supplied data. Examples of local studies, studies that incorporate national data, and vendor studies are included.

Online Catalogs (#96, July-August, 1983). Of 20 ARL libraries responding to a questionnaire, four are in the planning stage, four in the development stage, and seven in the implementation stage in preparing online catalogs. Five have operational systems. All but a few of the libraries have an actual or planned connection with other automated systems in the library. Survey results and documents illustrating online catalog development and use are included.

Building Renovation (#97, September, 1983). As library buildings become crowded or technologically outmoded, several ARL member institutions are turning to renovation or expansion of existing space as a less costly alternative to constructing new libraries. Planning and final report documents from six ARL member libraries as well as a listing of libraries contacted are included in the kit.

Telecommunications in ARL Libraries (#98, October, 1983). The implications of telecommunications extend to many areas of library operations, and also to campus, regional, network, national and international efforts. The kit provides an introduction to current and planned uses of telecommunications facilities in the computerized information systems of several ARL members, plus a few public libraries and other groups contacted during summer 1983.

Branch Libraries (#99, November-December, 1983). While online catalogs and other computerized operations are helping to integrate library systems, questions concerning centralization versus decentralization continue among large research libraries. In response to a May 1983 SPEC survey, 94 university library members provided information and documents about current branches, changes during the past five years, and current and planned automation activities.

VI. ORGANIZATIONAL TRAINING AND STAFF DEVELOPMENT

Changing client demands, budget trends, and technological innovations have fostered an increasing interest in staff training among academic and research libraries. With the multiplication of automated systems, the threat of obsolescence has become more real; it is apparent that nearly every staff member will require some retraining and frequent updates during his or her career. The demand for training continues as staff members prepare for new responsibilities.

Organizational training and staff development now encompasses a broader spectrum than ever before. There are demands for training events for groups at all levels: senior administrators, mid-level managers, and technical support staff. There is a need, too, for events focusing on a variety of specific topics. A third trend is visible in the requests for a series of programs, or the combination of training with other activities such as library self-studies.

During 1983 the OMS expanded its training programs to attempt to meet some of these needs. To address the interests of senior managers, the Office began to develop an institute for library directors. This project was prompted by a request from the OMS Advisory Committee for a Management Skills Institute especially for directors of ARL libraries. To assess interest in the proposal, directors were invited to express their intention of attending such an event and their preferences for topics. The design of the Institute was based partly on the responses, which included requests for coverage of subjects such as strategic planning methods and models, organizational change strategies, managing in a period of limited resources, strengthening the library's role and contribution within the academic setting, motivation of staff, executive decision-making, stress management, and organizational communication techniques. The event has been scheduled for February 1984.

The Office paid special attention during 1983 to the training and educational needs of two other groups: library schools and library school students. A workshop for beginning librarians was developed for students at the University of Chicago Graduate Library School. Designed to bridge the gap between library school coursework and the situations encountered by new professionals, the event focused on organizational skills. OMS staff also developed a proposal for an institute for library faculty, which has been funded by the Council on Library Resources. The Institute, to be held in 1984, will provide an opportunity for educators to discuss current issues with research librarians, administrators and others, and to investigate research library problems.

The topics of special focus workshops during 1983 extended into areas such as public services and cooperative collection development. Interest in such subjects, and in technical services development as well, are prompting increasing training efforts to accompany library self-studies and cooperative staff development projects among several libraries.

Interest in Office programs and methods among Australian librarians prompted an invitation to hold several Management Skills Institutes in that country during the spring. Advanced Management Institutes were held at Sidney and Melbourne with 78 participants. This international recognition of the effectiveness of OMS programs occurred when Australian academic librarians and library educators, who face problems similar to those of libraries in the U.S., began to discuss the need for a equivalent capability for their own developmental and training efforts.

Management Skills Institutes

Conducted by OMS staff and trained consultants, Basic and Advanced Management Skills Institutes are scheduled three times or four a year. Basic Institutes are three and one-half days long,

and are designed for mid-level administrators, supervisors, and others who want to develop managerial knowledge and abilities. Each event includes sessions on exploring management concepts and practices, examining personal values and beliefs, understanding the impact of values on organizations, and applying new knowledge to the local library situation.

Advanced Management Skills Institutes are scheduled one or two times a year, subject to demand. The Advanced Institutes are week-long events designed to provide further training for those who have attended other OMS events, and for senior administrators. Topics normally covered in the Advanced Institutes are team-building, budgeting and financial planning, information requirements for decision-making, leadership, and organizational diagnosis.

A Management Skills Institute can be scheduled for any ARL member library if a minimum of 20 participants is assured. In recent years, an increasing number of institutes have been planned on request, as in-house training for staff of a particular library, or because several libraries have agreed to cooperate to fund an institute. In 1983, nine basic Management Skills Institutes were held, and two advanced Institutes were conducted in Australia, as described above.

MANAGEMENT SKILLS INSTITUTES, 1983

Location/Sponsor	Participants
New York, N.Y.: Columbia University	35
Boston, Mass.: Massachusetts Institute of Technology	30
Columbia, Mo.: University of Missouri	31

*Sydney, Australia: Committee of Australian University Librarians	36
*Melbourne, Australia: Committee of Australian University Librarians	42
Tucson, Az.:	33
Houston, TX.: Houston Area Library Consortium	31
University of Alberta	38
New Hampshire	24
Washington, D.C.	18
University of Oregon	39
11 Institutes	357 participants

*Advanced Management Skills Institute

Special Focus Workshops

Special Focus Workshops are designed to meet specific training needs. Most of these topical events are conducted for one library or organization; sometimes institutions doing self-studies find it useful to have a special focus workshop designed to assist or elaborate on aspects of the study.

Popular subjects are supervisory skills, stress management, performance appraisal, and coping with change. The Public Services Project has a training component, under which workshops on services-related topics can be designed and scheduled. Several libraries took advantage of this capability during 1983.

SPECIAL FOCUS INSTITUTES AND WORKSHOPS, 1983

Sponsor	Topic and Number of Participants
Tri-State College Library Cooperative	Cooperative Collection Development (100 participants)
Indiana University	Public Services Priorities (34 participants)
University of Chicago Graduate Library School	Organizational Skills for Beginning Librarians (17 participants)
Johns Hopkins University	Supervisory Skills (18 participants)
Johns Hopkins University	Supervisory Skills (24 participants)
American Theological Library Association	Consultant Training Programs (50 particpants)
New England Library Association	Communication and Problem-Solving Techniques (200 participants)
University of Pittsburgh	Interpersonal Communication and Long-Range Planning (35 participants)
Medical Library Association	Quality Assurance (100 participants)
9 Workshops	578 participants

Management Training Film Program

Libraries that subscribe to the Management Training Film Program can choose from 13 films with accompanying training materials. OMS staff select films on the basis of relevance to library management and organizational issues, the needs of subscribers, and overall film quality. Training aids are developed by the Office for each film. Packages include information on the film's content, guidelines for discussion sessions, a list of additional resources, and suggestions for designing training sessions around the films.

Subscribers are entitled to borrow as many titles as they wish and to request them as frequently as scheduling allows. The subjects covered by the films include stress management, leadership styles, time management, and supervisory skills. During the year, an OMS Advisory Committee review of the cost and usefulness of this service led to a survey of participants. The results of this survey are being analyzed and a report to the committee is planned for the spring of 1984.

VII. APPLIED RESEARCH AND DEVELOPMENT

Collaborative Research/Writing Program

The OMS Collaborative Research/Writing Program offers selected librarians an opportunity to prepare publications on library issues in cooperation with OMS staff.

In 1983, one paper was issued: "Budget Allocation Systems for Research Libraries", by John Vasi, University of California, Santa Barbara. The paper documents existing budget practices at 10 ARL libraries, chosen to represent a range of collection sizes, funding levels, geographic locations, and academic emphases. Vasi examines how allocations are determined, discusses budget processes, and reviews current issues in the budgeting process. A method of compromising between historical allocation levels and absolute standards is suggested.

Five SPEC Kits and Flyers issued in 1983 were compiled by librarians working in the collaborative program. They are:

Integrated Library Information Systems	Arnold Hirshon Duke University
Library Materials Cost Studies	Frederick Lynden Brown University
Online Catalogs	William Gray Potter University of Illinois
Building Renovation	Rodney Hersberger University of Oklahoma
Telecommunications	Wayne Davison Research Libraries Group

National Collections Inventory Project

The OMS is working with committees and Executive Office staff of ARL, and the Research Libraries Group, on a project to extend the online collections conspectus developed by RLG into an inventory of North American research library collections. The first phase of the project, funded by a $45,000 grant from the Council on Library Resources, began July 1, 1983, at which time Jutta Reed-Scott joined the OMS staff as Collection Development Specialist. The project has developed technical manuals intended to assist individual libraries in completing the conspectus. Also during Phase I, the Office designed training sessions for library staff, and planned approaches for using the conspectus for cooperative decision-making.

In the fall of 1983, ARL received a $95,000 grant from the Lilly Endowment, Inc., to fund Phase II of the project, to begin early in 1984. Phase II activities include testing the procedures and resources already developed in three Indiana libraries: Indiana University, the University of Notre Dame, and Purdue University. The participants will use OMS tools to help gain a joint understanding of their collection strengths, and will identify resources available elsewhere in the state. The libraries also will develop and test methods for intrastate resource sharing.

OMS Associate Jeffrey Gardner is serving as project director. During Phase II, Jeff and Jutta Reed-Scott will work with directors and collection development staff at the three libraries. An advisory committee has been established to assist the project.

Public Services Research Projects

Seven ARL member libraries have received research grants of up to $4,000 each as part of the Public Services in Research Libraries Project supported by a grant from the General Electric Foundation. The projects were selected from 23 proposals by an advisory committee consisting of ARL library directors and a corporate information specialist. Criteria for selection were the importance of the topic, the careful articulation of research methodology, and the potential usefulness of the research to other libraries.

The institutions and projects are:

University of Arizona	Developing library instruction programs in a scientific discipline
Cornell University	Identifying and providing enhanced library services for agriculture researchers
University of Illinois/Urbana	Assessing needs of "invisible users," or those who access the library electronically from remote locations
Michigan State University	Identifying and analyzing non-users of library collections and services
New York University	Assessing users' effectiveness in using an online catalog
Pennsylvania State University	Comparative analysis of four types of user instructions for an online catalog
Texas A & M University	Examination of roles in helping users directly access commercial data bases

The projects began in the fall of 1983 and early 1984, and will end in mid-to-late 1984. Each library will submit a final report including methodology, findings, and conclusions. The reports will be available from OMS, and the grantees also will present their work at professional meetings and in publications.

Institute for Library School Faculty

During 1983, through initiatives by the ARL Committee on Library Education, the Office planned an institute for library school faculty to explore changes taking place in response to new trends in research, scholarship, the system of scholarly publication, and the implications of these changes for library education. The Council on Library Resources awarded a grant of $54,600 to fund the institute, which will be held in July 1984 at Chapel Hill, North Carolina. A 10-member advisory committee has been established.

The three-week program will consist of lectures, workshops, small group discussions, and field experiences in major research libraries in the Chapel Hill area. The first week will consist of workshops on issues, prospects and future needs of research libraries. The second will involve a practicum including on-site data gathering and investigation. In the third week, the group will discuss the first two weeks' work, and a panel of research library directors will assist participants in integrating and assessing their experiences. Discussion will lead to preparation of individual reports dealing with aspects of the work. Twelve to fifteen library school faculty members are expected to participate.

Technical Services Study

During the year, the OMS developed a paper on a technical services self study procedure as an additional resource for libraries wishing to pursue assessments of this area of operations. Funding options for the technical services study are being pursued.

VIII. OMS PRIORITIES FOR 1984

Each year, the OMS staff reviews Office programs in consultation with the OMS Advisory Committee. The review is the basis for setting program priorities for the upcoming year. For 1984, the following priorities have been established.

Academic Library Program

ALP funding provided by the Mellon Foundation and the Council on Library Resources ended in September 1983. The Association's commitment to ongoing financial support of OMS allows the Office to continue the basic services offered to ARL members through the program. OMS staff will work with the ARL Management and Statistics Committee to define the availability and costs of studies and consulting services.

The Office expects to operate about 15 library studies with OMS staff sharing the work load with trainees from the Consultant Training Program (CTP). Because the CTP has ended, work will be confined to completing internships of the 1983 group. An ongoing task is to coordinate the assignments of all graduates, assist with their work on projects, and evaluate the results.

With the completion of the six Public Services pilot studies, the study manual now in draft format will be revised and the study made available to libraries generally. Other projects to be completed during 1984 include the Washington Consortium CAP study and the manual for assessment of small library collections.

Information Exchange and Publications Program

During 1984, the Systems and Procedures Exchange Center will continue its regular kit/flyer publication schedule, slated to include topics in technology, personnel and management. Increased attention will be given SPEC file searches for members, to enable the Center to identify trends and topics where more information is needed. Three to five on-demand surveys, one all-member mail survey, and several surveys to selected libraries will be conducted. In addition to the publication of 10 kits and flyers, the Center will maintain the expanded SPEC index and produce two additional publications including occasional papers. SPEC file searches, document loans, and referrals also will be handled.

Organizational Training and Staff Development

In addition to maintaining current programs in this area, the staff will conduct a Management Institute for ARL directors and a series of public services workshops on such topics as promotion of services, improving relations with users, and evaluation of services. The institute for library school faculty funded by the Council on Library Resources also will be designed, conducted, and evaluated (see below).

The 1984 training schedule includes two public Management Skills Institutes with additional Institutes by special request, and three advanced Management Skills Institutes with one of the three scheduled for Australia. Twelve Special Focus Workshops will be designed and conducted.

The Management Training Film Program will undertake a review of current films and update the collection.

Applied Research and Development

During 1984, the seven public services research projects funded under the General Electric Foundation grant will be completed and results of project work will be communicated through professional meetings and publications. Presentations are scheduled for the ACRL meeting in Seattle in April and the American Library Association meeting in Dallas in June. Phase II of the National Collections Inventory Project will be in operation. Pilot studies at the three Indiana libraries should be completed or near completion at the end of the year, and staff will be engaged in revising the technical manual and training materials.

The Office has submitted a proposal to the National Endowment for the Humanities for funding to support preservation studies among ARL members. If the proposal is funded, participants will be chosen and studies will begin. Work to design and test a self-study for technical services, based on the preliminary designs completed during 1983, will go forward, including a proposal to an appropriate funding agency. As mentioned in last year's annual report, the Office still plans to assess the feasibility of establishing a Survey Analysis Center.

Two projects are being advanced in cooperation with ARL committees. The institute for library faculty developed on initiatives from the ARL Committee on Library Education/Planning Group will be held during 1984, with the attendant tasks of publicizing the institute, securing participants through a national search process, engaging speakers and facilitators, and evaluating the event. Current work with the ARL Research Libraries' Staffing Task Force includes a meeting to determine possible research and/or program needs in the staffing area.

APPENDIX A
STAFF AND PROGRAM PUBLICATIONS
1983

I. General

Gardner, Jeffrey J. "ARL's Preservation Program." Presented February 1, 1983, Music Library Association meetings, Washington, D.C.

_____. "Collection Evaluation." Presentation at the Colloquium on Collection Evaluation, March 22, 1983, University of Nebraska, Lincoln, Neb.

_____. "Evaluation of Library Programs." Presented June 20, 1983, American Theological Library Association meetings, Richmond, Va.

Rosenberg, Jane A. "New Ways to Find Books: Searching, Locating and Information Delivery." Presented at the Organization of American Historians Annual Meeting, April, 1983; to be published in The History Teacher.

_____. "Online Library Catalogs." Organization of American Historians Newsletter (forthcoming); to be republished in Computer Applications for Historians (Organization of American Historians, in press).

Rosenberg, Jane A., and Maureen Sullivan. Resource Notebook on Staff Development. Washington, D.C., Office of Management Studies, June, 1983.

Subject Index to SPEC Kits, 1973-1983- . Edited by Jane A. Rosenberg. Washington, D.C., Office of Management Studies, 1983-.

Vasi, John. Budget Allocation Systems for Research Libraries. Occasional Paper no. 7. Washington, D.C., Office of Management Studies, January, 1983.

Webster, Duane E. "Issues in the Financial Management of Research Libraries." Journal of Library Administration 3 (Fall/Winter 1982) 13-22.

_____. "Quality Assurance." Presented at the Medical Library Association meetings, May 30, 1983.

_____. "Risk Capital for Academic Library Development." Fourteenth and Fifteenth Annual Alumni-in-Residence Programs, 1982-1983. School of Library Science, University of Michigan. Ann Arbor, 1983.

II. Collection Analysis Project

McGill University Libraries. Collection Analysis Project Final Report. Montreal, Quebec, 1982.

III. Public Services in Research Libraries

Public Services in Research Libraries: An Assisted Self-Study Manual. Preliminary edition; distribution limited to project test libraries. March, 1983.

IV. Organizational Screening Program

University of Arizona. Science-Engineering Library. Final Report, 1982-83 Planning Study. Tucson, Az., 1983.

V. Academic Library Development Program

University of Miami. Otto G. Richter Library. Academic Library Development Program: Report of the Self-Study. Coral Gables, Fla., June, 1983.

Southeast Missouri State University. Kent Library. Academic Library Development Program: Volume I: Study Team Reports; Volume II: Task Force Preliminary Reports. Cape Girardeau, Mo., February, 1983.

University of Tulsa. The University of Tulsa Libraries - The 1980s and Beyond. The Report of the Academic Library Development Program. June, 1983.

VI. Small College Collection Assessment Project

Atlanta College of Art. The Past, Present and Future: A Final Report of the Collection Assessment Study, 1981-1982. Atlanta, Ga., n.d.

Will W. Alexander Library, Dillard University. Final Report: Measuring the Circulation Use of a Small Academic Library Collection: Collection Analysis. New Orleans, La., n.d.

L. Zenobia Coleman Library, Tougaloo College. Collection Analysis Project: Final Report. Tougaloo, Miss., May, 1983.

Hollis Burke Frissell Library, Tuskegee Institute. Collection Use Study Final Report. N.p., March, 1983.

FINANCIAL TABLES FOR 1983

OMS CORE PROGRAMS
for Calendar Year 1983

SOURCES OF SUPPORT

1. Association of Research Libraries	$95,000
2. Income from Sales and Fees	136,700
3. Council on Library Resources	51,000
4. Interest on Cash Reserve	3,576
5. Andrew W. Mellon Foundation	37,500
TOTAL	$343,776

OMS PROGRAM EXPENDITURES+

1. Research and Development	$16,909
2. Academic Library Program	138,960
3. Information Collection and Dissemination	67,586
4. Training	51,214
5. Operation/Grant Management	44,186
TOTAL	$338,855

OMS LINE ITEM EXPENDITURES

1. Salaries and Benefits	$151,261
2. Consultant Fees	9,800
3. Travel	65,397
4. Supplies and Materials	32,739
5. Printing and Duplicating	36,168
6. Equipment	2,715
7. Rent and Other Costs	40,775
TOTAL	$338,855

+ Figures rounded for this report. Detailed financial reports are included in the ARL Minutes as part of the audited ARL accounting statements.

SEPARATELY FUNDED PROJECTS+

	INCOME	EXPENSES
General Electric Foundation Public Services Study	$128,928	$143,386
Council on Library Resources National Collections Inventory Phase I	43,500	39,324
Lilly Endowment National Collections Inventory Phase II	95,718	615
Meyer Foundation Washington Consortium	13,545	13,373

+Separately-funded projects operate on other-than calendar year. Detailed financial reports are subaitted to funding agencies.

APPENDIX C
OFFICE OF MANAGEMENT STUDIES
ADVISORY COMMITTEES 1983

OMS Advisory Committee

Joan Chambers*
University Librarian
University of California Library
Riverside

Richard DeGennaro*
Director
University of Pennsylvania
Libraries

Jay Lucker, Chair
Library Director
Massachusetts Institute of
Technology

Frank Rodgers
Director
University of Miami Library

Martin D. Runkle
Director
University of Chicago
Library

Richard Talbot*
Director
University of Massachusetts
Library

Clyde Walton
Director
University of Colorado Library

Joining the Committee in 1984:

Herbert Johnson, Director
Emory University Library

Sul H. Lee
Dean, University Libraries
University of Oklahoma

Susan K. Martin, Librarian
Johns Hopkins University

*New members beginning in 1983

Academic Library Program Advisory Committee

Joseph A. Boisse
Director, Paley Library
Temple University

Evan Ira Farber
Director
Earlham College Library

Carla Stoffle
Assistant Chancellor
University of Wisconsin, Parkside

Gloria Terwilliger-Brown
Director of Learning Resources
Northern Virginia Community College

Jay Lucker
Library Director
Massachusetts Institute of Technology

Kathryn Mohrman
Assistant to the President
Association of American Colleges

Julie Virgo
Executive Director
Association of College and Research Libraries

James Wyatt
Director
University of Rochester Libraries

Lilly Project Advisory Committee

Harold Baker
Systems Librarian
Indiana State University

Charles Banet
President
St. Joseph's College

Brenda Bankart
Psychology Department
Wabash College

Evan Ira Farber
Library Director
Earlham College

Jean Hutton
Library Consultant
Rt. 6, Box 867
North Carolina

Barbara E. Markuson,
Director
Indiana Cooperative Library Services Authority
Indiana Interchurch Center

Susan Brynteson
Library Director
University of Delaware

Donn Neal
Vice President
Great Lakes College Association

Dwight F. Burlingame
Dean of Library Services
Bowling Green State University

Patricia A. Sacks
Library Director
Muhlenberg College

Preservation Planning Program Advisory Committee

Paul Banks
School of Library Service
Columbia University

David Laird
Librarian
University of Arizona

Sally Buchanan
Preservation Officer
Stanford University Libraries

John Finzi
Director, Collection Development Office
Library of Congress

H. Joanne Harrar
Director of Libraries
University of Maryland Library

David Stam
Director, The Research Libraries of the New York Public

Gay Walker
Head, Preservation Department
Yale University Library

Public Services in Research Libraries Project

Harold Billings
Director
University of Texas

Robin Downes
Director
University of Houston

Jay Lucker, Chair
Library Director
Massachusetts Institute of Technology

Susan Martin
Librarian
Johns Hopkins University
Milton S. Eisenhower Library

Robert Miller
Librarian
University of Notre Dame

Merrily Taylor
Librarian
Brown University

Paul Vassallo
Dean of Library Services
University of New Mexico

National Collections Inventory Project Advisory Committee

David Farrell
Assistant University Librarian
Indiana University

Leslie Hume
Associate Director of Program Coordination
Research Libraries Group, Inc.

Susan Nutter
Assistant Director of Libraries
Massachusetts Institute of Technology

David Stam
Director of the Research Libraries
New York Public Library

Nancy Gwinn
Associate Director of Program Coordination
Research Libraries Group, Inc. (through August 1983)

Paul Mosher
Assistant University Librarian
Stanford University

Elaine Sloan
Dean of University Libraries
Indiana University

Advisory Committee, Institute on Research Libraries for Library School Faculty

Irene Hoadley
Director
Texas A & M University Libraries

Edward Holley
Dean, University of North Carolina
School of Library Science

Margot McBurney
Chief Librarian
Queen's University Library

Charles McClure
Associate Professor, School of Library Science
University of Oklahoma

Ruth Person
Assistant Dean
School of Library and Information Science, Catholic University

Ronald Powell
Assistant Professor
School of Library Science
University of Michigan

Robert Stueart
Dean, Graduate School of Library and Information Science
Simmons College

Merrily Taylor
Librarian
Brown University

Robert Vosper
Professor, Graduate School of Library and Information Science
University of California, Los Angeles

Herbert White
Dean, School of Library and Information Science
Indiana University

APPENDIX D
CONSULTANT TRAINEES AND PROJECT ASSIGNMENTS
AS OF DECEMBER 31, 1983*
CLASS OF 1980

Name and Institution	Assignments
Noreen S. Alldredge Director of Libraries Montana State University	University of Illinois, Chicago Circle CAP (P)
Bella Z. Berson Associate Librarian Yale University	Consultation Skills Workshop (T) Public Services Workshop University of California (T)
Keith Cottam Director University of Wyoming	Management Skills Institutes, Ohio State University & Columbia, Md. (T) University of Houston Public Services Study (P)
Howard W. Dillon Associate Director for Public Services University of Chicago	MRAP Ball State Univ. (P) SLPP, North Park College (C)
Joanne R. Euster Director of Libraries San Francisco State University	OMS Occasional Paper (R/W) Organizational Screening, North Texas State (P)
Larry Hardesty Library Director Eckerd College	SLPP Lake Forest College (P)

*(P): Practicum; (C): Principal consultant; (T): Training assignments;
(R/W): Research/writing assignment.

Fred M. Heath University Librarian University of North Alabama	SLPP, Carleton College, Wittenberg College (C) and St. Olaf College (P)
Phyllis E. Jaynes *Director of User Services* Dartmouth College	McGill University CAP (P)
William G. Jones Assistant University Librarian University of Illinois, Chicago Circle	OMS Occasional Paper (R/W) Minneapolis MSI (T) SLPP, Hanover College (P) SLPP, St. Joseph's College (C)
Marianne Kozlowski Programmer MCS Company	Organizational Screening, Temple Univ. (P) MSI, Minneapolis (T) SLPP St. Xavier College(C)
Charles Lowry Library Director University of South Alabama	SLPP, Transylvania College (P)
Donna L. McCool Assistant Director for Administrative Services Washington State University	University of British Columbia CAP (P)
Neosha Ann Mackey Home Economics Librarian Ohio State University	MSI, Minneapolis (T)
Roger H. Parent Executive Secretary Library Administration and Management Association American Library Association	Public Services Workshop U. of California (T) MSI, San Diego (T)

Anne Peyton Assistant to the Director, Major Gifts The Campaign for Dartmouth	SLPP, DePaul (P) MSI, New Hampshire (T) MSI, MIT (T)
Dennis E. Robison University Librarian University of Richmond	SLPP, Earlham College (P)
Grace M. Reed Executive Director Copyright Office Library of Congress	University of Maryland CAP (P) MSI for Theological Librarians (T)
Jordan M. Scepanski Director, Central Libraries Vanderbilt University	University of Notre Dame CAP (P) SLPP, Univ. of Evansville (C)
George Soete Assistant University Librarian for Humanities & Social Sciences University of California, San Diego	SPEC Flyer/Kit (R/W) Brigham Young CAP (P) SLPP, Huntington College, Franklin College, Goshen College(C) Public Services Workshop University of California, Berkeley (T) MSI, Boulder, CO, Columbia University (T) MSI, Tucson, Arizona, University of Oregon (T)
Sara Lou Whildin Campus Head Librarian Pennsylvania State University, Delaware County	Franklin & Marshall College CAP (P)

*(P): Practicum; (C): Principal consultant; (T): Training assignments; (R/W): Research/writing assignment.

CLASS OF 1981

Arnold Bellefontaine *Executive Officer* Office of the Associate Librarian for National Programs Library of Congress	Management Skills Institute *Columbia, MD. (T)* Stress Workshop,University Center of Georgia (T) Supervisory Skills, University of Chicago (T) George Washington University CAP (P)
Joyce A. Bennett Library Director Bentley College	Brandeis University Technical Services Planning Study (P)
Martha Bowman University Librarian University of Louisville	Howard University CAP (P)
Joseph Branin Assistant Director for Collection Development University of Georgia	ALDP, Miami University (P) MSI, Nashville TN, and Mobile, AL (T)
Joan Chambers University Librarian University of California, Riverside	ALDP, California State University, Sacramento (P)
Clinton Howard Acquisitions Librarian University of Kansas	
Willis M. Hubbard Library Director Stephens College	

Ronald Leach Dean of Libraries Indiana State University	Coping with Change Workshop University of Michigan (T) MSI, Ohio State University (T)
Philip E. Leinbach University Librarian Tulane University	Supervisory Skills Workshop York University (T)
Charles Martell Head of Acquisitions University of Illinois, Chicago Circle	Organizational Screening San Jose (P) MSI, University of Pittsburgh (T)
Arthur Miller College Librarian Lake Forest College	SLPP, Gannon University (P) SLPP, Alverno College (C)
Peggy Overfield* Administrative Librarian SUNY, Potsdam	Public Services Study Michigan State University (P)
Shelley Phipps Head, Science & Engineering Library University of Arizona	CAP University of Colorado (P) MSI, HARLIC (Houston), University of Alberta, (T)
Barbara Rice Principal Librarian - Reference New York State Library	
D.W. Schneider Associate Director of the Library Louisiana State University	CAP, Houston (P)
Thomas Shaughnessy Director University of Missouri, Columbia	ALDP, University of Tulsa (P)

*Deceased, February 1984

Patricia Swanson Associate University Librarian for Science University of Chicago Libraries	University of Michigan CAP (P) Performance Appraisal, Northern Illinois University (T) CTP Workshop (T) Public Services in Research Libraries Project (C) University of Arizona Planning Retreat (T) University of Pittsburgh Communication & Long Ranging Planning Workshop (T) MSI, University of Alberta (T) MSI, Tucson, Arizona (T) CTP Assessment Workshop (T) University of Chicago Organizational Skills for Beginning Librarians (T)
Mary Trochim Freelance Librarian Ithaca, N.Y.	Small College Collection Assessment, Dillard Univ., Atlanta College of Art (P) Tougaloo College, Tuskegee Institute (C)
David Walch Director of the University Library California Polytechnic State University	Organizational Screening, University of Arizona (P)
H. Lea Wells Freelance Librarian Nashville, Tennessee	SPEC Flyer/Kit (R/W) MSI, Toronto (T)

CLASS OF 1982

Patricia L. Bril Chair, Department of Reader Services California State University,	MSI, Tucson, Arizona (T)
Kristen M. Skivington (Dahlen) Graduate Assistant Department of Management Texas A&M University	Advanced MSI Columbia, Md. (T)
Peter D. Haikalis Assistant Director, Readers Services San Francisco State University	Public Services Study University of California, Riverside (P) MSI, University of Missouri - Columbia (T)
Shirley Hallblade Director, Management Library Vanderbilt University	Public Services Study University of North Carolina (P)
Carolyn Harris Head, Preservation Department Columbia Univ rsity	MSI, Boston (T) Johns Hopkins Supervisory Skills Workshop (T)
Ellen Hoffmann Acting Director York University Library	Public Services Study Brown University (P)
Connie K. McCarthy Acting Director George Washington University	CAP, Georgetown University (P)

David R. McDonald Head Systems Office University Library University of Michigan	MSI, Texas (T)
R. Bruce Miller Library Systems Analyst University of Texas at Austin	Collection Analysis Project Vanderbilt (P)
Margaret Myers Director, Office of Library Personnel Resources American Library Association	MSI, Ann Arbor (T) Johns Hopkins Supervisory Skills Workshop (T)
Paul E. Peters Systems Development Coordinator Columbia University	Public Services Study Temple University (P) Consultation Skills Workshop (T)
Ann K. Randall Chief Librarian City College of CUNY	Public Services Study Temple University (P)
Karen L. Sampson Assistant to the Director University of Nebraska at Omaha	MSI, Alberta (T)
John W. Tanno Assistant University Librarian for Planning and Development University of California, Riverside	Collection Analysis Project University of Alberta (P)
David S. Zeidberg Curator of Special Collections George Washington University	Collection Analysis Project University of the District of Columbia (P) Collection Analysis Project Catholic University (P)

CLASS OF 1983

Mary J. Cronin
Assistant Director for Public
Services
Marquette University
Memorial Library

Allan J. Dyson
University Librarian
University of California, Santa Cruz

Bela Foltin
Head, Fine Arts & Media Depts.
University of Georgia

Alan E. Hagyard
Associate Library Systems Analyst
Yale University Library

Clifford H. Haka
Information Librarian
Michigan State University

Olive C. James
Chief, Loan Division
Library of Congress

Collection Analysis Project
Georgetown Law (P)

Gail A. Kennedy
Head of Acquisitions
University of Kentucky
King Library

David F. Kohl
Assistant Director for Undergraduate
Libraries
University of Illinois
at Urbana-Champaign

John Kupersmith Assistant for Public Services Programs University of Texas at Austin	
Patricia McClung Senior Program Associate Research Libraries Group, Inc.	MSI, University of Oregon (T)
James R. Martin Assistant Director for Public Services Florida State University	
Phyllis S. Mirsky Assistant University Librarian, Sciences University of California, San Diego	
Julie B. Nye Consultant Bahama, N.C.	Collection Analysis Project Duke University (P) MSI, Coral Gables, Florida (T)
Lance D. Query Director, Library Research & Analysis Northwestern University	
John D. Racine Acting Asst. Director for Technical Services University of Missouri	
Anne Reuland Information Services Librarian Vanderbilt University	MSI, Columbia, MD. (T)

Jeanne Richardson
Head of Science Libraries
University of Kansas

Beth J. Shapiro
Assistant Director for
Readers' Services
Michigan State University

Patricia Silvernail
Assistant University Librarian for
Public Services
University of Oregon

Barbara von Wahlde
Associate Director for
Technical Services
University of Michigan

Patricia B. Yocum
Head & Senior Associate Librarian
Natural Science, Museums &
Biological Station Libraries
University of Michigan

APPENDIX E

OFFICE OF MANAGEMENT STUDIES STAFF
1983

Duane E. Webster, Director
Jeffrey J. Gardner, Associate
Jutta Reed-Scott, Collection Development Specialist
(beginning July 1983)
Donna J. Reilly, Office Manager
Jane A. Rosenberg, Research Specialist (part time)
Maxine K. Sitts, Information Services Specialist
Maureen Sullivan, Training Program Specialist
(resigned March 1, 1983; currrently Head
of Library Personnel Office, Yale University)
Patricia K. Swanson, Public Services Specialist
(until November 1, 1983)